Profile of Private Sector Suppliers of Training Services in Ontario

Ontario
Ministry of Skills Development

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Profile Of Private Sector
Suppliers of Training Services In Ontario

Labour Market Research Group
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Profil des entreprises privées offrant des services de formation professionnelle en Ontario.

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INTRODUCTION

Part of the Ministry of Skills Development's mandate involves responsibility for policies and programs under the Ontario Training Strategy to enhance the skills base of Ontario's work force, a critical factor in improving the competitiveness of Ontario's economy and for adjusting to economic change. In a number of key programs of the Ontario Training Strategy, such as Ontario Skills, the Training Consulting Service and the Ontario Training Corporation, private firms which specialize in delivering training services to employers have a role to play.

Accordingly, the Ministry has a strong interest in obtaining a much more in-depth understanding of this component of Ontario's training industry and undertook a survey of these firms in the spring of 1988. While the survey results are of value to the Ministry for reviewing program initiatives, they will also be of interest to other members of Ontario's training industry, especially to the firms who participated in the survey.

This report provides a summary of the survey findings on the characteristics of the firms; their clients; the services and products they provide; their target occupations, courses and delivery modes; and a brief indication of future trends as seen by the respondents. The calendar year 1987 constitutes the reference period for the survey. In the Appendix to this report, a set of summary statistical tables and a copy of the survey questionnaire are presented.

SCOPE OF SURVEY

There are a large number of firms in Ontario's economy engaged in providing a broad spectrum of services in the field of human resource management and development in response to employers' demands. These services fall into such areas as productivity improvement programs, compensation plans, industrial relations, occupational health and safety, employment equity, executive search, counselling, and the design and delivery of training services. Firms in this latter category, those specializing in the design and delivery of training services to meet employers' needs to develop the skills of their employees, are the firms which were targetted for this survey. Excluded from the survey were manufacturers of equipment who provide vendor training, professional associations, private and public colleges, manufacturers and distributors of prepackaged training products, and companies who share their in-house training expertise in specialized technical fields with other firms.

Since there is no comprehensive list of firms which specialize in supplying training services to employers, respondents for this survey were identified by using a variety of sources. These include the membership roster of the Ontario Society for Training and Development, advertising brochures, and a directory of suppliers of products and services in the human resources development area produced by Croscan Publishing (publishers of The Human Resource). A total of 226 firms were identified through these three sources as being involved in the training business, and potential candidates for the survey.

Of this total, 49 firms were screened out of the list based on telephone contacts as not being appropriate organizations for the survey (e.g., conference centers, video companies, associations, etc.). The balance, 177 firms, were sent questionnaires and 132 returned them. Of these returns, 122 were acceptable for statistical analysis, which represents an effective response rate of 69 percent.

The profile of firms in terms of their size, services and products they provide, delivery modes, target markets, etc., based on these returns provides a number of valuable insights into this component of Ontario's training industry. A word of caution, however, is in order. Of necessity, the survey is restricted to firms which could be identified through sources such as directories and membership lists. Consequently, many individual training consultants who are either not listed in directories or in association membership rosters are not covered by the survey. As expected and as confirmed by the survey results, these consultants are numerous and are utilized extensively by firms to achieve greater flexibililty in the range of products and services they provide.

HIGHLIGHTS

This component of Ontario's training industry has a number of well defined characteristics. With respect to size of operation, it is heavily dominated by small organizations consisting of one-man/woman "shops", or independent firms with a small number of permanent employees. There are also a few large national or international corporations with training departments which provide services to external clients but the major functions of these corporations are unrelated to training. Although many firms are highly specialized in terms of their areas of expertise or the industry or occupation categories they target for delivering services, through networking and sub-contracting arrangements suppliers can be very flexible in the range of services they provide.

The main findings from the survey include:

- The majority of the firms are very small; about one-half have 5 or less employees, receive not more than 50 assignments per year, provide training services for up to 1,000 people annually, and have a gross revenue of less than $250,000.

- Through extensive use of networking and contract arrangements with other firms and independent self-employed trainers, firms achieve a great deal of flexibility in the range of services they provide to meet employers' demands; on average, the ratio of permanent full-time employees to those engaged through contract arrangements is close to 1:1.

- A substantial proportion of the firms are very young in terms of length of time they have been in business. One third have been in business for four years or less, and the majority have been in business for less than ten years. This finding, coupled with the observation that the majority of the firms are very small yet have flexibility in the range of services they provide by sub-contracting arrangements, indicates ease of entry into a knowledge-based industry where capital investment is not a deterrent.

- As in other knowledge-based industries, many of these firms draw on and trade in expertise and services internationally, especially in the United States and the United Kingdom; a large proportion also hold copyrights to training programs and materials.

- With respect to the domestic market, for a majority of firms the most important client base is located in Metropolitan Toronto, followed by other provinces in Canada, and other regions of Ontario.

- For a majority of the firms, the most important industry sector for clients is the public sector, followed by finance and insurance, manufacturing and business services.

- The management category represents the single most important client group for nearly all of these firms; less than one fourth of the

respondents list blue collar groups, e.g., technical, production and repair occupations, as major target occupations for services.

- The main activities of these firms centre around designing, delivering and publishing training programs, and human resource development consulting; the particular services provided within these main activities centre around training needs assessment, training the trainer, reinforcement training, evaluation of training programs, and providing custom-made and off-the-shelf programs.

- The majority of the firms target their training courses in the following areas: executive/management development; supervisory skills; communications skills; sales/marketing skills; and, personal growth; less than 30 percent of the respondents provide courses in industrial/technical and remedial basic education areas.

- The training programs offered are provided mostly through the following traditional types of media: seminars and workshops, printed material, role playing, lectures and demonstrations, and the use of case studies.

- Future trends as seen by the responding firms include: providing more training in smaller organizations and in the goods-producing sector; offering training to professional/technical, clerical and front-line employees, and blue collar workers; providing more customized training programs; and greater use of interactive video and computer assisted training.

PROFILE OF SURVEY RESPONDENTS

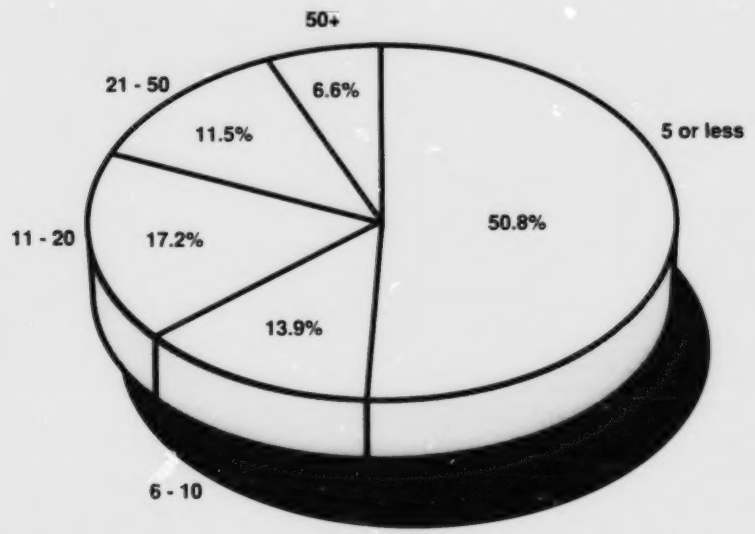
In this section of the report a more detailed profile of the survey respondents is presented. This profile, based on the replies of 122 of the firms surveyed, covers both the characteristics of these suppliers as well as the main characteristics of the clients they serve and the nature of the products and services they supply.

Employment and Contract Personnel

The prevalence of small establishments in this part of Ontario's training industry is reflected by the fact that ninety-three percent of the organizations reported fifty or fewer full-time, part-time and casual employees, while 51 percent employed five or fewer people (See Chart I). Overall these firms had approximately 1,700 to 1,800 employees in Ontario.

CHART I

Distribution of Respondents by Employment Size, 1987



However, it would be misleading to describe this component of the training industry only in terms of number of employees because of the importance of sub-contract arrangements with other firms or individual training consultants. In addition to paid employment, some 56 percent of the firms (See Appendix Table 1) engaged approximately 1,200 individuals on a contract basis, who provide expert or specialized skills as the need for such

arises on behalf of the firms. As will be seen later, some of these individuals are self-employed trainers, some are engaged on a networking basis from other private firms, and others are from public educational institutions.

PERCENT DISTRIBUTION OF WORKFORCE BY TYPE OF RELATIONSHIP WITH PRIVATE SECTOR SUPPLIERS OF TRAINING SERVICES

Type of Personnel	Percent
Full-Time Permanent Employees	51.6
Part-Time Permanent Employees	5.7
Casual Employees	2.7
Total Paid Employees	60.0
Contract Personnel	40.0
Total Workforce	100.0

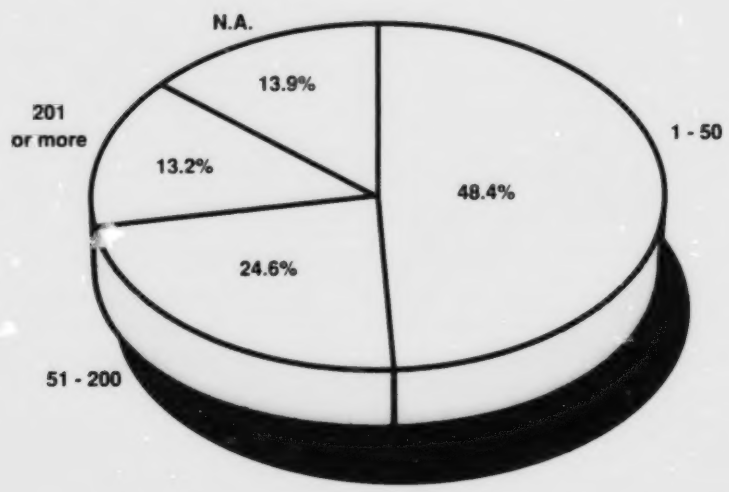
Assuming that some of the paid employees in the reporting firms are engaged in purely support functions, the ratio of professional services provided at a point in time by in-house staff to those provided on a sub-contract basis would appear to be close to 1:1. Regarding variations in the utilization of contract arrangements, there is no discernable pattern in the use of contract personnel. In some firms the number of contract personnel exceeds that of permanent employees; in other firms, with approximately the same volume of business and similar services, the reverse is true.

Volume of Assignments and Gross Revenues

In 1987, approximately one half of the survey respondents received up to 50 assignments per year (See Chart II.) and provided training services for up to

CHART II

Distribution of Respondents by Number of Assignments, 1987

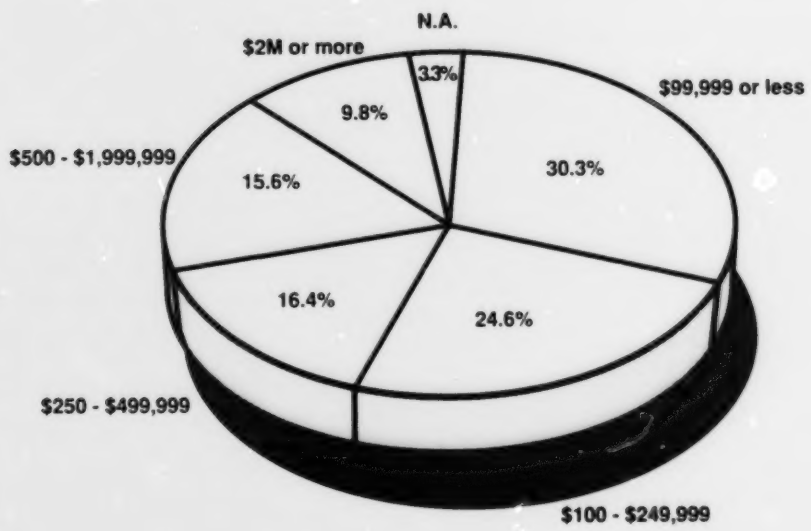


1,000 individuals. For just over one half (55 percent) of the responding organizations, the gross revenue generated from sale of training services in 1987 was less than $250,000; and for 30 percent it was less than $100,000. (See Chart III.) Given the preponderence of very small firms in this sector, these gross revenues should not be surprising.

At the other end of the spectrum, 13 percent of the organizations had over 200 assignments, 10 percent grossed over $2 million from sales of training services, and 29 percent trained more than 1,500 persons.

CHART III

Distribution of Respondents by Gross Revenue, 1987



While these data demonstrate the ranges in the size of operations within this industry, they should be addressed with caution. Close examination of the information supplied by the respondents indicate that:

- some firms serve clients not only in Canada but throughout the world and are unable to estimate the Ontario portion of assignments, revenues, or the total number ultimately trained;
- depending upon the structure of the business operation, sub-contracting arrangements can be intricate and extensive;
- the nature and volume of services per assignment can vary significantly; e.g., compare the potential cost and circulation of a published manual to that of a custom-made skills training program for highly skilled workers in a small manufacturing or service department of a client.

International Orientation

As with many professional services, the private sector suppliers of training services draw on and exchange expertise and services internationally. While the majority of the firms are headquartered in Canada (89 percent), 37 percent have access to training programs or materials in the United States, 11 percent in the United Kingdom, and a smaller proportion elsewhere in the world. Further, 41 percent of these firms import training programs and/or materials while 57 percent export them to the United States, the Pacific Rim, United Kingdom, Western Europe and elsewhere. (See Appendix Table 3.) The two-way trade is most brisk among firms whose main functions include human resource development, designing, and publishing.

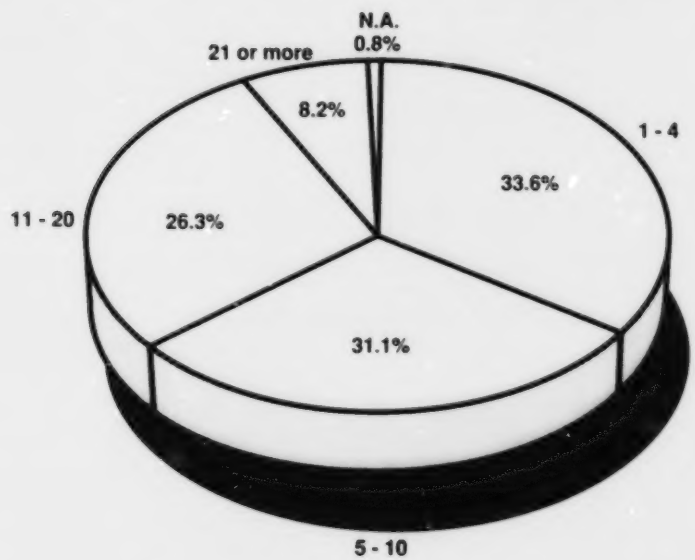
Sixty-five percent of the responding firms, mostly among human resource developers, designers and publishers, also hold copyrights.

Age of Organizations

The majority of the firms are young with 65 percent having been in Ontario for 10 years or less. In fact, fully one third have been in operation for less than 5 years. (See Chart IV.) It is also apparent that firms specializing in needs assessment only is a relatively new trend - 75 percent of all firms in this category have been in operation less than 5 years. Also, from the more detailed examination of the response it appears that while slightly more than half of the responding firms who supply training materials have been doing so for a number of years, some 44 percent have been in this type of activity for less than 5 years.

CHART IV

Distribution of Respondents by Number of Years in Business, 1987



Characteristics of Training Consultants' Clients

Many of the private sector training consultants serve "niche" markets either in terms of geographic location, industry or occupation, or some combination of the three. For example, in 1987 some firms operated only in Metro Toronto, some specialized in municipal public works and utilities, and some provided advanced training only for the accounting profession.

Nearly all firms (94 percent) serve clients in Metropolitan Toronto and vicinity, but only 44 percent have clients in South-Western Ontario, 39 percent in Eastern Ontario and 24 percent in Northern Ontario. These firms also have client bases in the eastern and western provinces. In addition, 27 percent have major clients in the United States, and less than 10 percent have clients elsewhere in the world. (See Appendix Table 5.)

With respect to clients by industry sector, the most important source of clients is the public sector (71 percent), followed by finance, insurance and real estate (70 percent), the manufacturing sector (66 percent) and business services (61 percent). Less than one third of the firms have clients in transportation and storage, wholesale trade, accommodation, food and beverage service, mining and other primary industries, and construction. (See Appendix Table 5.)

On an occupational basis, services supplied by the private training firms centre around white collar occupations, with the management group representing the single most important client group (91 percent of the firms). In contrast, less than one fourth of the firms list service, production, repair, transport equipment, primary or construction trades and occupations as major clients for the training programs and services they offer. (See Chart V, page over.)

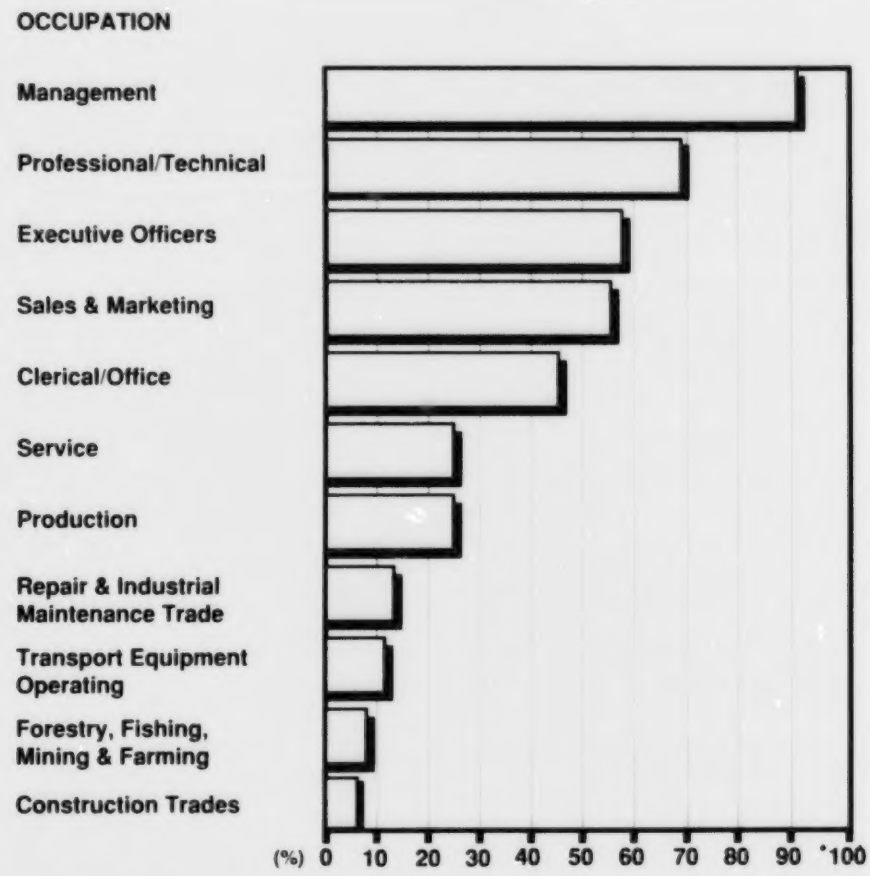
Products and Services

To gain a clearer understanding of the products and services firms supply, respondents were asked to report both the main activities of their organization and the types of training services they provided their clients. The main activities and the frequency with which they were reported by respondents involve:

o designer of training programs/materials/equip.	70.5%
o consultant for human resources development, including training needs assessment	67.2%
o publisher of training programs and materials	35.2%
o deliverer of training programs	23.0%
o mfr. of training programs/materials/equip.	14.8%
o consultant for needs assessment only	9.8%
o supplier of training programs/materials/equip.	7.4%
o other	17.2%

CHART V

Distribution of Respondents' Major Client Groups by Occupation, 1987



The most prevalent activity among these firms is that of designing of training programs, materials and equipment. Concerned with the "why" and "how" of training and human resource development, this activity is pivotal for most products and services offered to clients, and relatively few of the responding organizations indicated this as their only activity.

The category "consultant for human resources development, including training needs assessment" relates to needs analysis (including job and task analyses) and development and selection of training programs and courses. This covers a broad range of expertise and services. While one fifth of the respondents indicated this to be their only activity, it is the second most important activity for respondents who engage in other training related activities.

A small proportion of firms are "consultants for needs assessment only" which appears to be a relatively new area of specialization. Further, very few firms reported that they consider "delivery of training programs" to be among their main activities.

Activities that are more product oriented, namely "publishing of programs and materials", "manufacture of programs, materials and equipment," and "supplying of programs, materials and equipment" are somewhat less prevalent. In almost all instances, these activities were coupled with delivery of other services to clients.

Since the incidence of the main activities found among private sector consultants of the training industry varies considerably, the specific services and facilities made available to clients also vary. Some of the specific services, no doubt, are an integral part of the total "product". For example, while only 23 percent of the responding firms consider "delivery of training programs" to be among their major activities, between 80 and 90 percent of the firms do offer this service to their clients.

Further, from the information supplied by responding organizations it appears that between 80 and 90 percent of them offer custom made programs and conduct training needs assessment. Between 70 and 80 percent provide reinforcement training, training the trainer, and evaluation of training results. Off-the-shelf programs and courses and access to technical expertise are provided by 50 to 60 percent, but testing of trainees is performed by less than 50 percent of the organizations.

These services are provided usually on the clients' premises, although many respondents do make their own premises available to clients or use other outside facilities.

TRAINING SERVICES PROVIDED TO CLIENTS BY PRIVATE SECTOR SUPPLIERS

Type of Service	Percent of Respondents
Delivery of Program/Course	)
Custom Made Program/Course	) 80% - 90%
Training Needs Assessment	)
Reinforcement Training	)
Training the Trainer	) 70% - 80%
Evaluation of Training Results	)
Off-the-Shelf Program/Course	) 50% - 60%
Technical Expertise	)
Trainee Testing	) less than 50%

Use of Outside Suppliers

During the course of delivery of products and services to clients, many of the responding firms utilize outside resources. Forty-three percent of the respondents indicated that they use independent self-employed trainers and 28 percent indicated that they networked with other firms. About eleven percent also rely on public institutions to provide for some aspect of the products and services. However, while the incidence of networking and sub-contracting with outside suppliers is common, for most firms these arrangements account for less than 10 percent of their total services provided to clients.

USE OF EXTERNAL SUPPLIERS FOR PROVISION OF TRAINING SERVICES

Type of Supplier	Percent of Respondents Using Them
Another Private Firm	27.9
Indep. Self-Employed Trainer	43.4
Public Institution	10.7
Other	11.5

Across all the different types of services provided by the responding firms, it appears that about 75 percent of all services are provided to clients by the responding organizations themselves, 19 percent by independent self-employed trainers, and 7 percent by other private firms. (See Appendix Table 6.) Less than half of one percent of the total services are provided by utilizing other outside suppliers, such as educational institutions.

The use of these outside suppliers is particularly frequent in providing custom-made programs and courses, delivering programs and courses, and in supplying technical expertise. Outside suppliers are seldom used to provide off-the-shelf programs or courses.

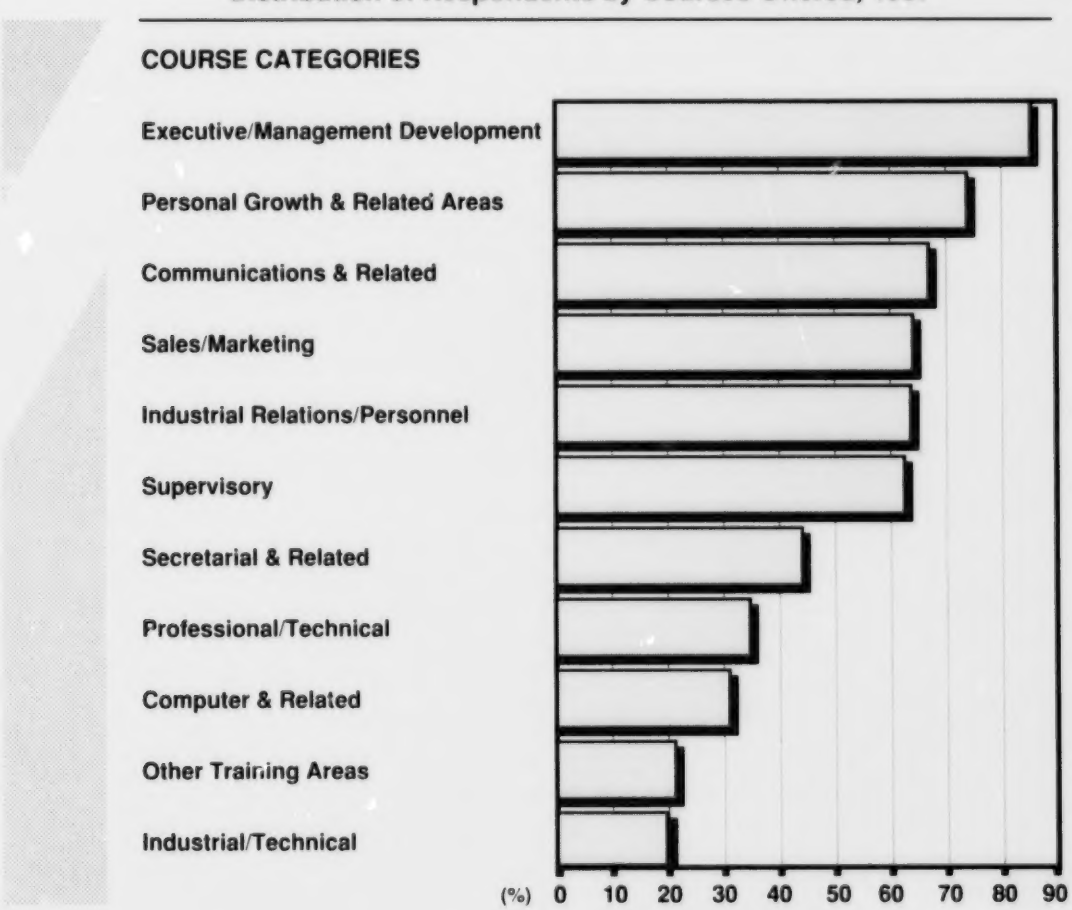
Training Courses Offered

The types of training programs offered by the responding firms are heavily concentrated around executive/management development, supervision, and sales and marketing. For example, almost 80 percent of the firms focus their programs on executive and management development, 74 percent on supervisory skills and 55 percent on sales and marketing. In contrast, only 20 percent of the firms focus their programs on the industrial/technical area and 15 percent on remedial basic education.

It is also noteworthy that there are many more firms that offer courses in some program categories than there are firms who indicate these categories as areas of concentration. (See Chart VI for courses offered by program category.) The most notable categories are communications, industrial relations/personnel, and personal growth. Only for supervisory and professional/technical training areas are there fewer respondents offering courses than those indicating these as areas for targetting.

CHART VI

Distribution of Respondents by Courses Offered, 1987



In terms of individual courses, the greatest number of firms (64 percent) offer a course in "executive development". Generally, as the course content becomes more specific or narrower in application, the fewer the firms which offer them. For example, even in the management/executive development program area, only 30 to 40 percent of the firms offer courses in marketing, 10 to 20 percent offer courses in finance, and less than 10 percent offer courses in purchasing.

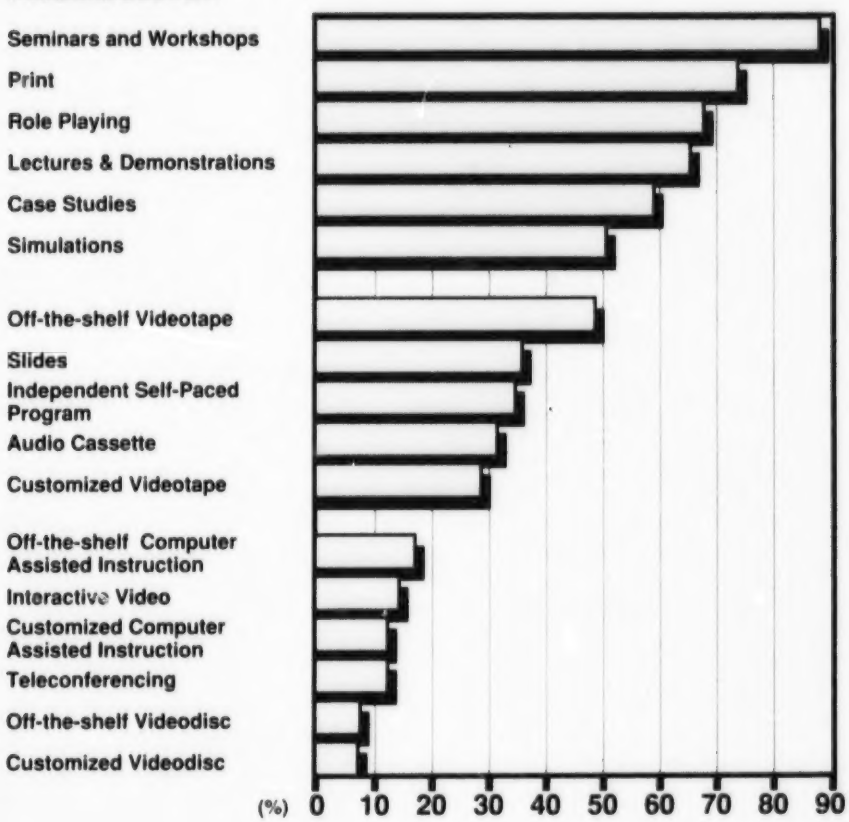
This same pattern repeats itself in other program fields. In fact, very specialized professional/technical courses are offered by fewer than 20 percent of all firms, and specific courses in industrial/technical skills by fewer than 10 percent. (See Appendix Table 7.)

Training Program Delivery Modes

Eighty-nine percent of all firms use the seminar and workshop format to deliver training programs. The second most prevalent method is print (72 percent), followed by role playing (66 percent), lectures and demonstrations (64 percent), and case studies (57 percent). (See Chart VII.)

CHART VII

Distribution of Respondents by Method of Program Delivery, 1987



Use of interactive video (14 percent), customized computer assisted instruction (12 percent) and off-the-shelf computer assisted instruction (17 percent) were relatively low in usage as were videodisc delivery methods. No doubt, for specific courses these particular technologies may be used more often, but on a program category basis there was no discernable departure from the general pattern which favours the traditional methods of delivery. The frequency with which methods were employed was nearly the same whether programs were targetted to management, computer training, or industrial/technical skills.

Future Trends in the Training Industry

A large proportion of the firms reported that they will target smaller employers and develop skills at all levels within an organization in the future. There was a concern that the needs of middle management, clerical/office staff, production workers and front-line staff were being overlooked. Another area of emphasis consultants are seeing as a future trend is a movement into sectors which are currently under serviced, i.e. manufacturing, health and social services, the primary industries and the customer service areas.

The firms foresee a movement towards more customized programs to address specific needs at all levels within an organization to improve the productivity of the whole organization. Specific comments were provided on the need for more technical and professional training in areas which are not covered by the public institutions or professional associations.

In order to service the smaller clients, cost is a factor that must be addressed. To accomplish this, they expect a move towards the development of independent self-paced programs, interactive video programs, and the teaching of courses via computer assistance and video. Some firms foresee a greater emphasis on training-the-trainer as a service so that programs could be run internally by managers and there could be more "hands-on" skill training.

In regards to the future impact of technological innovations, suppliers view client demands being driven by the introduction of micro-computer based systems and software innovations.

Concerns, however, were voiced in the areas of: "more U.S. trainers with free trade"; "increased competition from major suppliers"; "more focus on national uniformity to ensure greater uniformity of standards and quality of work and of the qualifications of the individual"; and the need for "expansion to meet needs in third world countries".

APPENDIX I

STATISTICAL TABLES

Table 1

Distribution of Respondents by Number of Employees and Contract Personnel, 1987

Number of Employees*	Percent of Respondents
2 or less	26.2
3-5	24.6
6-10	13.9
11-20	17.2
21-50	11.5
50+	6.6

*Includes Full- and Part-time Permanent and casual employees but excludes contract personnel.

Number of Contract Personnel	Percent of Respondents
0	44.3
1-2	16.4
3-5	10.7
6-10	9.0
11-20	9.0
21-50	7.4
51 or more	3.3

Table 2

Distribution of Respondents by Volume of Assignments, Gross Revenues, and Persons Trained, 1987

Number of Assignments	Percent of Respondents
1-10	15.6
11-20	12.3
21-30	10.7
31-50	9.8
51-100	13.1
101-200	11.5
201 or more	13.2
No Response	13.9

Gross Revenue	Percent of Respondents
$99,999 or less	30.3
$100 - 249,999	24.6
$250 - 499,999	16.4
$500 - 749,999	7.4
$750 - 999,999	3.3
$1 - 1,999,999	4.9
$2 million or more	9.8
No Response	3.3

Number of Persons Trained	Percent of Respondents Training That Number
1-100	13.1
101-300	10.7
301-500	11.5
501-700	5.7
701-1000	10.7
1001-1500	7.4
1501 and more	28.7
No Response	12.3

Table 3

Respondents' Headquarters, Access to Training Materials Outside Canada, and Clients Outside Canada, 1987

Location of Respondents' Headquarters	Percent of Respondents Located There
Canada	88.5
United States	9.8
United Kingdom	.8
Western Europe	.8

Access to Training Programs and/or Materials in Other Countries	Percent of Respondents Having Access
United States	36.9
United Kingdom	10.7
Pacific Rim	6.6
Western Europe	5.7
Other	1.6

Location of Where Training Services are Provided Outside Canada	Percent of Respondents Providing Service
United States	50.0
Pacific Rim	16.4
United Kingdom	15.6
Western Europe	14.8
Other	14.8

Table 4

Distribution of Respondents by Number of Years in Business, 1987

Number of Years	Percent of Respondents
1-2 years	9.0
3-4 years	24.6
5-6 years	9.8
7-8 years	9.8
9-10 years	11.5
11-15 years	11.5
16-20 years	14.8
21 or more	8.2
Not Available	0.8

Table 5

Distribution of Respondents' Major Client Groups by Geographic Location, by Occupation and by Industry

	Percent of Respondents Having These Types of Clients
By Location	
Metro Toronto and vicinity	94.3
Eastern Provinces	50.0
Western Provinces	48.4
South-Western Ontario	44.3
Eastern Ontario	38.5
United States	27.0
Northern Ontario	23.8
North West Territories	11.5
Other (Third World)	9.8
Pacific Rim	7.4
United Kingdom	7.4
Western Europe	6.6
By Occupation	
Management	91.0
Professional/Technical	68.0
Executive Officers	57.4
Sales and Marketing	55.7
Clerical/Office	45.1
Service	23.8
Production	23.8
Repair & Industrial Maintenance Trade	13.1
Transport Equipment Operating	11.5
Forestry, Fishing, Mining & Farming	8.2
Construction Trades	6.6
By Industrial Sector	
Government Services	70.5
Finance, Insurance, and Real Estate	69.7
Manufacturing	66.4
Business Services	60.7
Communication and Utilities	55.7
Education Services	47.5
Health and Social Services	43.4
Retail Trade	40.2
Transportation and Storage	32.8
Wholesale Trade	28.7
Accommodation, Food and Beverage Service	27.9
Mining, Milling, Quarrying and Oil Wells	27.9
Primary Industries	22.1
Construction	16.4

Table 6

Incidence of Contract Arrangements with Another Firm or Independent Self-Employed Trainer by Type of Service

		Service Provided By:		
Training Related Services	**Proportion of Respondents Providing Service**	**Contract with Another Priv. Firm**	**Indep. Self Employed Trainer**	**Total**
Training Needs Assessment	82.0	3.6	14.4	100.0
Trainee Testing & Assessment	76.6	4.7	18.8	100.0
Evaluation of Training Results	86.0	2.2	11.8	100.0
Reinforcement Training	79.0	2.9	18.1	100.0
Training The Trainer	79.2	5.1	15.6	100.0
Off-the-Shelf Program/Course	97.0	1.5	1.5	100.0
Custom-Made Program/Course	70.4	9.2	20.4	100.0
Delivery of Program/Course	64.7	8.0	27.2	100.0
Technical Expertise	53.2	17.8	28.9	100.0
All Services	74.7	6.6	18.7	100.0

Table 7

Distribution of Respondents by Courses Offered

Course Categories	Percentage of Respondents Focusing on these Categories	Percentage of Respondents Offering Courses in Category
Executive/Management Development	79.5	83.6
Supervisory	73.8	62.3
Secretarial and Related	41.8	44.3
Professional/Technical	41.0	35.2
Industrial/Technical	19.7	22.1
Computer and Related	28.7	32.0
Sales/Marketing	54.9	63.1
Communications and Related	58.2	65.6
Industrial Relations/Personnel	41.0	63.1
Personal Growth and Related Areas	54.9	72.1
Remedial Basic Education	14.7	—
Other Training Areas	7.4	23.0

Courses Categories and Courses Offered	Percent of Respondents Offering Course in Category
Executive/Management Development:	
Executive Development	63.9
Organizational Development	59.8
General Principles of Management	55.7
Strategic Planning	48.4
Human Resources Planning	42.6
Sales	40.2
Marketing	36.9
Quality Circles	27.0
Industrial Relations	23.0
Personnel Administration	23.0
Accounting	13.9
Financing	11.5
Purchasing	6.6
Conflict Management	3.3
Project Management	2.5
Other	23.8

Table 7

Distribution of Respondents by Courses Offered (Cont'd)

Courses Offered (Cont'd)	Percent of Respondents Offering Courses in Category
Supervisory:	
Basic Supervisory Skills	43.4
Problem Solving	27.0
Work Planning	20.5
Conflict Management	20.5
Interviewing Skills	14.8
Other	45.9
Secretarial and Related:	
Secretarial and Support Staff Development	29.5
Office Management & Procedures	15.6
General Principles of Bookkeeping	4.9
Other	12.3
Professional/Technical:	
Computer	18.9
Accounting	9.8
Health	8.2
Engineering	6.6
Law	5.7
Other	6.6
Industrial/Technical:	
Production and Quality Control	11.5
Productivity Control	10.7
New Methods and Procedures	8.2
Electronics	6.6
CAD/CAM/CIM	6.6
Fluid Power	4.1
Industrial Engineering	4.1
Numerical Control	2.5
Welding	2.5
Metal Machining	2.5
Instrumentation	2.5
Environmental Control	1.6
Blue-Print Reading	.8
Other	4.1
Computer and Related:	
Word Processing	22.1
Computer Literacy	20.5
Computer Principles and Strategies	16.4
Information Systems	15.6
Data Processing	13.1

Table 7

Distribution of Respondents by Courses Offered (Cont'd)

Courses Offered (Cont'd)		Percent of Respondents Offering Courses in Category
Specific Software:	Spread Sheet	13.1
	Data Base	14.8
	Integrated Software	8.2
	Other Software	13.1
Other		8.2
Sales/Marketing:		
Customer Relations		41.0
Training and Motivating Sales People		37.7
Creativity and Selling		35.2
Psychology of Selling		34.4
Fundamentals of Professional Selling		32.0
Strategic Planning		27.0
Marketing/Planning		24.6
Business Development		23.0
Telemarketing		16.4
International Marketing		10.7
Merchandising		8.2
Promotion		5.7
Advertising		4.9
Retail Management		3.3
Other		9.8
Communications and Related:		
Interpersonal Effectiveness		50.0
Presentation Skills		45.9
Basic and Advanced Listening and Speaking		33.6
Basic and Advanced Reading and Writing		21.3
Technical Writing		19.7
Group Dynamics		3.3
Other		9.0

Table 7

Distribution of Respondents by Courses Offered (Cont'd)

Courses Offered (Cont'd)	Percent of Respondents Offering Courses in Category
Industrial Relations/Personnel:	
Train the Trainer	50.8
Performance Appraisal	43.4
Organization Development	42.6
Recruitment and Selection	35.2
Employee Orientation	31.1
Human Resource Planning	30.3
Job Evaluation	24.6
Labour Relations	17.2
Health and Safety	15.6
Career Planning	3.3
Legal Aspects of Personnel	3.3
Coaching & Counselling	.8
Other	9.8
Personal Growth and Related Areas:	
Motivation and Leadership	57.4
Time Management	47.5
Creativity and Innovation	41.8
Assertiveness	38.5
Stress Management	37.7
Objective Setting	3.3
Other	14.8
Other Training Areas:	
Government Programs	9.8
Safety and Security	7.4
Legislation and Law	6.6
Other	3.3

Table 8

Distribution of Respondents by Method of Program Delivery, 1987

Methods of Program Delivery	Percent of Respondents Using the Method
Seminars & Workshops	88.5
Print	72.1
Role Playing	65.6
Lectures & Demonstrations	63.9
Case Studies	57.4
Simulations	49.2
Off-the-shelf Videotape	47.5
Slides	34.4
Independent Self-Paced Program	33.6
Audio Cassette	30.3
Customized Videotape	27.9
Off-the-shelf Computer Assisted Instruction	17.2
Interactive Video	13.9
Customized Computer Assisted Instruction	12.3
Teleconferencing	12.3
Off-the-shelf Videodisc	7.4
Customized Videodisc	7.4
Files	6.6
Other	12.9

APPENDIX II

SURVEY QUESTIONNAIRE

Ministry of
Skills
Development

Ontario

Survey of Training Services in Ontario

Survey of Training Services in Ontario

On behalf of the Ministry of Skills Development thank you for participating in this survey on training services available to Ontario employers from private enterprises.

Objective

Our objective is to develop a profile on the characteristics of private organizations that supply Ontario employers with training products and services. This profile will be of value to the Ministry and the newly established Ontario Training Corporation in considering how the services made available by private-sector firms can be drawn upon in delivering the Government's Ontario Training Strategy. This will be done by focusing on the general characteristics of these organizations, of their products and services, and of their major client groups.

Confidentiality

All responses by individual companies will be treated as strictly confidential by the members of the Ontario Ministry of Skills Development and the Ontario Training Corporation. Individual company data will not be released under any circumstances.

Questionnaire Instructions

Identifying Yourself
Please ensure that the information on the front cover which identifies your organization is correct.

Completing All Questionnaire Sections
The questionnaire is divided into the following parts:
Section A: About Your Organization
Section B: About Your Client Groups
Section C: About Your Training Services and Programs
Section D: About Your Training Courses
Section E: About Trends in Your Industry

Please answer all questions for 1987 in each section that are relevant to your organization or that part of your organization which is devoted to providing training services, programs and materials.

Some of the information requested might not be readily available, or might require extensive research on your part. In these cases, please provide us with your best estimate.

Some of the questions might not be relevant to your operation. In these cases, please check the appropriate box or enter N.A. (not applicable) on the appropriate line.

Returning Your Completed Questionnaire
Your response will be essential to this study's success. Please return the completed questionnaire in the pre-stamped envelope provided, as soon as possible, and no later that April 29, 1988 to the attention of Ms. Andrea Soberg, Ministry of Skills Development, 6th Floor, Suite 610, 500 University Avenue, Toronto, Ontario M5G 1V7. Please do not hesitate to call Ms. Soberg at (416) 963-2012 if you have any questions concerning this questionnaire.

Submitting Literature On Your Organization's Services
The Ministry of Skills Development would greatly appreciate any brochures or literature you may wish to submit on your organization. This information will be helpful to the Ministry Training Offices and to the Ontario Training Corporation as reference material.

Thank you in advance for your cooperation.

Section A

About Your Organization

1. Which of the following best describes the main functions of your organization? (Check all that apply).

- ❑ Consultant for human resources development, including training needs assessment;
- ❑ Consultant for training needs assessment only;
- ❑ Designer of training programs, materials and equipment;
- ❑ Manufacturer of materials and equipment for training programs;
- ❑ Publisher of training programs and materials;
- ❑ Other, please specify:

_____

_____

2. In what country is your organization's headquarters located?

- ❑ Canada
- ❑ USA
- ❑ Other, please specify:

_____

_____

3. What is the approximate number of years your organization has been operating (i.e. physically located) in Ontario?

_____ years

4. What is the approximate number of people employed in your organization?

_____ Full-Time Permanent

_____ Part-Time Permanent

_____ Contract Personnel

_____ Casual

5. What is the approximate number of assignments/agreements your organization receives annually for its services in Ontario?

_____ Assignments/Agreements

6. What is the approximate gross revenue generated annually from the sale of your organization's training services to Ontario employers?

- ❑ $99,999 or less
- ❑ $100 — 249,999
- ❑ $250 — 499,999
- ❑ $500 — 749,999
- ❑ $750 — 999,999
- ❑ $1 — 1,999,999
- ❑ $2 million or more

7. Does your organization have access through special licencing arrangements to training programs and/or materials developed or published outside of Canada?

- ❑ No
- ❑ Yes, please specify which countries:

_____

8. Does your organization provide training services and/or materials to clients in other countries?

- ❑ No
- ❑ Yes, please specify which countries:

_____

_____

9. Does your organization hold copyrights to training programs and/or materials?

- ❑ No
- ❑ Yes

Section B

About Your Client Groups

1. Within which of the following geographical areas are your major client groups* located? (Check all that apply.)

   - ❑ Metropolitan Toronto and Vicinity
   - ❑ South-Western Ontario
   - ❑ Eastern Ontario
   - ❑ Northern Ontario

   - ❑ Other Provinces and Territories, please specify: _____

   - ❑ Other Countries, please specify: _____

2. To which of the following industry sectors defined by types of goods or services produced, do your major client groups* belong? (Check all that apply and clarify, if necessary.)

   - ❑ Primary Industries (Agricultural, Fishing and Trapping, Logging and Forestry)
   - ❑ Mining, Milling, Quarrying and Oil Well
   - ❑ Manufacturing
   - ❑ Construction

   - ❑ Transportation and Storage
   - ❑ Communication and Utilities
   - ❑ Wholesale Trade
   - ❑ Retail Trade

   - ❑ Finance, Insurance and Real Estate
   - ❑ Business Services
   - ❑ Government Services
   - ❑ Education Services

   - ❑ Health and Social Services
   - ❑ Accommodation, Food and Beverage Services
   - ❑ Other Services, please specify:

   _____

* "Major client groups" refers to those groups from which most of your revenues are generated.

3. To which of the following occupational categories do your major client groups* belong? (Check all that apply.)

- ❑ Executive Officers
- ❑ Management (e.g., financial management, human resource management, sales management)
- ❑ Professional/Technical (e.g., accountants, engineers, lawyers, technicians, technologists)
- ❑ Sales and Marketing (exclude executive & management categories, but include services, sales clerks, etc.)

- ❑ Clerical/Office (e.g., account clerks, tellers, word processors, receptionists)
- ❑ Service (e.g., protective service, food and beverage, accommodation, personal)
- ❑ Construction Trades (e.g., plumber, carpenter)
- ❑ Transport Equipment Operating/Materials Handling (e.g., truck driver, shipping and receiving)

- ❑ Production (include journeymen and all other workers in direct production e.g., processing, fabricating, machining, assembly)
- ❑ Repair and Industrial Maintenance Trades (e.g., mechanics, millwrights, industrial electricians)
- ❑ Forestry, fishing, mining, farming
- ❑ Other (please specify):

_____

4. What is the approximate number of persons in Ontario directly trained through your organization's training programs in 1987?

_____ Persons

* "Major client groups" refers to those groups from which most of your revenues are generated.

Section C

About Your Training Services and Programs

1. What types of training service(s) and facility(s) does your organization provide and how are they made available to your clients? (Check all that apply according to location and supplier.)

	Location:			Supplier:			
Training Services/Facilities	Clients' Premises	Your Firm's Premises	Other	Your Firm	Another Private Firm	Ind. Self-Empl. Trainers	Other, Please Specify
Training Needs Assessment	❑	❑	❑	❑	❑	❑	_____
Trainee Testing and Assessment	❑	❑	❑	❑	❑	❑	_____
Evaluation of Training Results	❑	❑	❑	❑	❑	❑	_____
Reinforcement (Follow-up) Training	❑	❑	❑	❑	❑	❑	_____
Training the Trainer	❑	❑	❑	❑	❑	❑	_____
Off-the-Shelf Program/Course	❑	❑	❑	❑	❑	❑	_____
Custom-Made Program/Course	❑	❑	❑	❑	❑	❑	_____
Delivery of Program/Course	❑	❑	❑	❑	❑	❑	_____
Space, e.g., lecture room	❑	❑	❑	❑	❑	❑	_____
Equipment, e.g., computer	❑	❑	❑	❑	❑	❑	_____
Technical Expertise, e.g., access to experts in subject	❑	❑	❑	❑	❑	❑	_____
Other, please specify:							
_____	❑	❑	❑	❑	❑	❑	_____
_____	❑	❑	❑	❑	❑	❑	_____
_____	❑	❑	❑	❑	❑	❑	_____

2. To what extent are your organization's training services provided to clients either by other private enterprises (i.e., networking) or by independent self-employed trainers on a sub-contract basis?

Other Private Enterprises	Independent Self-Employed Trainers
❑ 9% or less	❑ 9% or less
❑ 10—24%	❑ 10—24%
❑ 25—49%	❑ 25—49%
❑ 50—74%	❑ 50—74%
❑ 75—100%	❑ 75—100%

3. On which of the following target categories do your organization's training programs focus, and through which methods are they offered to clients? (Check all that apply on the chart which lists target categories vertically and methods of delivery horizontally.)*

Methods of Delivery

Target Categories	Print	Audio Cassette	Slides	Files	Off-the-Shelf Videotape	Customized Videotape	Off-the-Shelf Videodisc	Customized Videodisc	Interactive Video	Off-the-Shelf Computer Assisted Instruction	Customized Computer Assisted Instruction	Independent (Self-Paced) Program	Lectures & Demonstrations	Seminars and Workshops	Teleconferencing	Role Playing	Case Studies	Simulations	Other
Executive/Management Development																			
Supervisory																			
Secretarial/Clerical																			
Professional Technical																			
Industrial Technical																			
Computer Related																			
Sales/Marketing																			
Communications																			
Industrial Relations/Personnel																			
Personal Growth																			
Remedial Basic Education																			
Other:																			

* See Section D for further clarification of target categories.

Section D

About Your Training Courses

This section deals with more specific information on the types of training courses your company provides. This information, in addition to any literature on these courses you wish to submit, will be of value to the Ministry of Skills Development and the Ontario Training Corporation.

1. In which of the following categories would your organization's training courses fall? (Check all that apply.)

Executive/Management Development

- ❑ General Principles of Management
- ❑ Executive Development
- ❑ Accounting
- ❑ Financing

- ❑ Human Resources Planning
- ❑ Strategic Planning
- ❑ Personnel Administration
- ❑ Organizational Development

- ❑ Industrial Relations
- ❑ Marketing
- ❑ Sales
- ❑ Purchasing

- ❑ Quality Circles
- ❑ Other, please specify: _____

_____

Supervisory

- ❑ Please Specify _____

_____

Secretarial and Related

- ❑ Office Management and Procedures
- ❑ Secretarial and Support Staff Development
- ❑ General Principles of Bookkeeping
- ❑ Other, please specify: _____

_____

Professional Technical

- ❑ Accounting
- ❑ Law
- ❑ Health
- ❑ Computer

- ❑ Engineering
- ❑ Other Professional Technical Skills, please specify: _____

_____

Industrial Technical

- ❑ Industrial Engineering
- ❑ Production and Quality Control
- ❑ Productivity Control
- ❑ Numerical Control

- ❑ Welding
- ❑ Metal Machining
- ❑ Instrumentation
- ❑ Blue-Print Reading

- ❑ Electronics
- ❑ Fluid Power
- ❑ Environmental Control
- ❑ CAD/CAM/CIM

- ❑ New Methods and Procedures
- ❑ Other Industrial Technical Skills, please specify: _____

_____

Computer and Related

- ❑ Computer Literacy
- ❑ Computer Principles and Strategies
- ❑ Information Systems
- ❑ Data Processing

- ❑ Word Processing
- ❑ Specific Software taught, please specify: _____

_____

- ❑ Other, please specify: _____

_____

Sales/Marketing

- ❑ Marketing/Planning
- ❑ Psychology of Selling
- ❑ Creativity and Selling
- ❑ Telemarketing

- ❑ International Marketing
- ❑ Fundamentals of Professional Selling
- ❑ Customer Relations
- ❑ Training and Motivating Sales People

- ❑ Business Development
- ❑ Strategic Planning
- ❑ Merchandising
- ❑ Advertising

- ❑ Promotion
- ❑ Other, please specify: _____

_____

Communications and Related

- ❑ Basic and Advanced Reading and Writing
- ❑ Basic and Advanced Listening and Speaking
- ❑ Technical Writing
- ❑ Interpersonal Effectiveness

- ❑ Presentation Skills
- ❑ Other, please specify: _____

_____

Industrial Relations/Personnel

- ❑ Train the Trainer
- ❑ Job Evaluation
- ❑ Employee Orientation
- ❑ Performance Appraisal

- ❑ Recruitment and Selection
- ❑ Organization Development
- ❑ Human Resource Planning
- ❑ Labour Relations

- ❑ Health and Safety
- ❑ Other, please specify: _____

_____

Personal Growth and Related Areas

- ❑ Assertiveness
- ❑ Motivation and Leadership
- ❑ Creativity and Innovation
- ❑ Stress Management

- ❑ Time Management
- ❑ Other, please specify: _____

_____

Other Training Areas

- ❑ Government Programs
- ❑ Legislation and the Law
- ❑ Safety and Security
- ❑ Others Not Mentioned Above, please specify: _____

_____

Section E

About Trends In Your Industry

1. In your professional opinion, what trends or major changes in the training industry do you foresee in the next five years? Please elaborate on the following using the terminology utilized throughout this questionnaire.

   a) How might your client groups change? (defined in section B-2)

   b) Which occupational categories may become more important as target groups for training? (defined in section B-3)

   c) To what extent would the above changes in the client groups or target occupations be due to technological innovations adopted by Ontario employers?

d) What changes might occur in your training services and facilities? (see section C-1)

e) What changes might occur in the focus of training programs and methods of delivery? (see section C-3)

f) What changes might occur in the structure of the training industry (e.g., globalization) and why?

2. Do you have further comments you would like to make?

Thank you for completing this questionnaire.

Please check this box if you would like to receive a copy of the final report.❑

Completed by:

Name: _____

Title: _____

Telephone Number: _____